



## Town of Allenstown

Town Administrator

16 School Street

Allenstown, NH 03275

603-485-4276 ext. 5

[ta@allenstown.org](mailto:ta@allenstown.org)

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### ELDERLY EXEMPTION

#### Application Criteria

- I. Applicant must be 65 years old as of April 1<sup>st</sup> of the tax year applying. (Married couples, the eldest should apply).
- II. Applicant must have resided in the state of New Hampshire for at least three years prior to year of application.
- III. The property on which the exemption is claimed must be your principal place of abode.
- IV. Applicant must own real estate individually, own jointly or in common with another or be married to an individual for at least five years who owns real estate within the community.
- V. Property must meet the definition of a residential real estate, per RSA 79:39-a (c), which includes the housing unit, which is the person's principal home and related structure. It does not include attached dwelling units and unattached structures used or intended for commercial or other non-residential purposes.
- VI. Property cannot have been transferred to the applicant, from a person under the age of 65, and related to the applicant by blood or marriage, within the past five years.

#### AGE GROUPS AND PROPERTY ASSESSMENT EXEMPTION AMOUNTS:

\*AGE GROUPS EXEMPTION AMOUNTS (effective 2<sup>nd</sup> issue bill).

65 years up to 74 years	\$20,000
75 years up to 79 years	\$30,000
80+ years and older	\$50,000

## ELDERLY TAX EXEMPTION QUALIFICATION WORKSHEET

(May be used for re-qualifications or Blind, Deaf or Disabled Exemptions)  
(Three-year NH residency required for Elderly Exemption  
and Five-year NH residency for all other Exemptions.)

**Please print all information clearly.**

Applicant's  
Name \_\_\_\_\_ D.O.B. \_\_\_\_\_

Spouse's Name \_\_\_\_\_ D.O.B. \_\_\_\_\_

Property Address: \_\_\_\_\_ Map \_\_\_\_\_ Lot \_\_\_\_\_

Mailing Address (if different from above): \_\_\_\_\_

TELEPHONE Number: \_\_\_\_\_

Is the above location your legal residence? \_\_\_\_\_ Years a N.H. resident \_\_\_\_\_

Marital Status: Married\* \_\_\_\_\_ Single/Widow \_\_\_\_\_

Property Owned: Solely \_\_\_\_ Jointly \_\_\_\_ In Common \_\_\_\_ Date of Purchase \_\_\_\_\_

**\*NOTE:** If the real estate is owned by his/her spouse, they must have been married and living together for at least five (5) years. Taxpayers with their property in a Trust or Life Estate must also file for PA-33 "Statement of Qualification".

If you have filed any of the following documents, please provide a copy.

- 1. Interest and Dividend tax return to the State of New Hampshire.**
- 2. Federal Income Tax Form**
- 3. Any other documents as needed to verify eligibility.**

RSA 72:33, VI: allows Selectmen or Assessing Officials to require those receiving tax exemptions or credits to re-file their qualifying information at least once in every review cycle (5 years) but not more than annually. Failure to file such periodic statements may, at the discretion of the Assessing Officials, result in loss of the exemption or tax credit for that year.

## FINANCIAL QUALIFICATIONS

### Income Limitations:

Includes income from any source including Social Security or pension but excludes a) life insurance paid on the death of an insured, b) expense and cost incurred in the course of conducting a business enterprise, C) proceeds from the sale of assets. The income restrictions adopted by the community of Allenstown, NH is as follows:

A. Single \$ \_\_\_\_\_ - Net income cannot exceed \$35,000

B. Married \$ \_\_\_\_\_ - Net Income cannot exceed \$50,000

### Asset Limitations:

To include all net assets excluding the value of the applicant's actual residence and the land upon which it is located up to two acres, or the minimum family lot size specified by local zoning. The asset restriction adopted by the community of Allenstown, NH is:

\$ \_\_\_\_\_ - Total assets cannot exceed \$85,000

### Documents required for new applicants.

1. Proof of birth (birth certificate or driver's license acceptable)
2. SSA-1099 Statement (Social Security Benefit Statement)
3. Previous years income tax form, including all support documents – if not filing a federal income tax form, the following forms will be required if applicable: Form 1099R – Distribution of pensions, annuities etc., all W2 wage statements and 1099 interest statements.
4. Bank statements (three consecutive months of checking and savings) and verification of assets listed.

Please call the Assessing Office at 485-4276 if you have questions or need assistance completing forms.

**RETURN THIS APPLICATION (qualifying worksheet and form PA-29) TO THE ASSESSOR'S OFFICE ON OR BEFORE APRIL 15 OF THE YEAR YOU WILL BE REQUESTING THE EXEMPTION.**

## INCOME:

Please list the source and amount of all income for the year for both you and your spouse.

SOURCE: (Net Income)	Owner #1	Owner #2
Social Security	\$ _____	\$ _____
Pension & Retirement	\$ _____	\$ _____
Wages	\$ _____	\$ _____
Rental Income	\$ _____	\$ _____
Other Income/Annuities	\$ _____	\$ _____
Interest Income	\$ _____	\$ _____
Total Income:	\$ _____	\$ _____

## ASSETS:

**REAL ESTATE:** (not including your primary residence and up to the greater of 2 acres or the minimum single family residential lot size specified in the local zoning ordinance.)

Other Real Estate & Location(s):

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Current Market Value (s) \_\_\_\_\_

## BANKS ETC.

Institution Name:	Type	Value/ Amount
_____	Checking	\$ _____
_____	Savings	\$ _____
_____	Stocks & Bonds	\$ _____
_____	IRA's	\$ _____
_____	Other	\$ _____
_____	Other	\$ _____

**VEHICLES:**

1. Make/ Model/ Year \_\_\_\_\_ Estimated value: \_\_\_\_\_
2. Make/ Model/ Year \_\_\_\_\_ Estimated value: \_\_\_\_\_
3. Boat(s)/ Trailer(s): Make/ Model/ Year \_\_\_\_\_ Estimated value: \_\_\_\_\_  
\$ \_\_\_\_\_
4. RV(s) / Other(s): Make/ Model/ Year \_\_\_\_\_ Estimated value: \_\_\_\_\_
5. Jewelry / Antiques: \_\_\_\_\_ Estimated value: \_\_\_\_\_
6. Other: \_\_\_\_\_ Estimated value: \_\_\_\_\_

**TOTAL OF ALL ASSETS:** \_\_\_\_\_

I do hereby certify that the above is a true and correct statement of my financial condition to the best of my knowledge.

Date: \_\_\_\_\_ Applicant's Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Applicant's Signature: \_\_\_\_\_

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**Disposition of Application (For Selectmen /Assessors' Use)**

The required documents have been reviewed and meet the requirements: Yes \_\_\_\_ No \_\_\_\_  
By \_\_\_\_\_

The Assessor's Office recommends the Selectmen:

Approve Exemption: ☐ or Deny Exemption: ☐ see reason(s)

Reason(s) for Denial:

\_\_\_\_\_

\_\_\_\_\_

Amount of Exemption Allowed: \$ \_\_\_\_\_ from total current yearly valuation

\_\_\_\_\_ Date: \_\_\_\_\_  
Selectman signature

\_\_\_\_\_ Date: \_\_\_\_\_  
Selectman signature

\_\_\_\_\_ Date: \_\_\_\_\_  
Selectman signature